



USDA TURKEY MARKET NEWS REPORT

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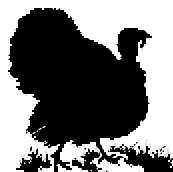
U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE



DOMESTIC MARKET HIGHLIGHTS

The market tone was fully steady to firm on hens, steady to fully steady on toms. Supplies of hens were tight, toms were available. Demand was good and centered on smaller volume packages. Trading was moderate on fresh tom breast meat, light on the balance.

EXPORT MARKET HIGHLIGHTS

Export trading was heavy on thigh meat, light on tom drums, mechanically separated turkey (MST), and tails. Limited supplies of frozen MST were offered at higher trending values.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **SEPTEMBER 30, 2004**

CURRENT SHIPMENTS 2/	OFFERS	SALES	WTD AVG	VOLUME (000)	FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
					WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	75-77	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	75-77	-	-	-	-	-	-	-	-
WESTERN REGION 5/	75-77	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	75-76	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	75	-	-	-	-	-	-	-	-
WESTERN REGION 5/	75-76	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **OCTOBER 1, 2004**

CURRENT SHIPMENTS 2/					FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	75-77	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	75-77	-	-	-	-	-	-	-	-
WESTERN REGION 5/	75-77	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION 3/	75-76	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	73-75	-	-	-	-	-	-	-	-
WESTERN REGION 5/	75-76	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF OCTOBER 1, 2004	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO	MONTH OF SEPTEMBER	CURRENT MONTH	LAST MONTH	SAME MONTH YEAR AGO
8-16 LB HENS				8-16 LB HENS			
EASTERN REGION	75.21	75.11	63.28	EASTERN REGION	74.69	73.32	61.52
CENTRAL REGION	77.00	74.06	63.33	CENTRAL REGION	74.27	72.98	60.70
WESTERN REGION	75.70**	75.00**	63.33	WESTERN REGION	74.50	72.86	61.79
16-24 LB TOMS				16-24 LB TOMS			
EASTERN REGION	74.80**	74.00	61.63	EASTERN REGION	73.98	72.50	60.49
CENTRAL REGION	74.30**	74.00	60.82	CENTRAL REGION	73.60	72.32	59.51
WESTERN REGION	74.80**	74.00**	62.00	WESTERN REGION	73.98	72.52	59.68

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	83-84
FROZEN TURKEYS Y TOMS 14-24#	83
FROZEN TURKEYS Y TOMS 24-28#	83

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	113-123
TURKEYS Y TOMS UNDER 22#	112-123
TURKEYS Y TOMS 22-24#	106-116
TURKEYS Y TOMS 24-26#	106-120
TURKEYS Y TOMS 26 LBS & OVER	112-122

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION, CENTS
PER POUND, WEEK OF 04-OCT-2004

	<u>(8-16#)</u>		<u>(16-24#)</u>	
	<u>HENS</u>	<u>LBS</u>	<u>TOMS</u>	<u>LBS</u>
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	87.83	199	88.06	48
SALES (PROMOTIONS NOT INCLUDED)	87.83	199	88.06	48
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS

AUGUST	435,710*
September 1-25, 2004	348,327*
To date 2004	3,702,807*
To date 2003	3,974,607*

* PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTS

Week ending 25-SEP-04

(Preliminary) (Released 1:00 Eastern Time)

	<u>—YOUNG TURKEYS—</u>			<u>OLD</u>	<u>TOTAL TURKEYS</u>	
	<u>THOUSAND</u>	<u>PCT CHG</u>	<u>AVG</u>	<u>BANDED</u>	<u>HEAD</u>	<u>AVG</u>
	<u>HEAD</u>	<u>PW</u>	<u>LIVE WT</u>	<u>-THOUSAND</u>	<u>HEAD</u>	<u>LIVE WT</u>
North East	552	-27	20.42	(A)	553	20.42
South Atlantic	829	6	32.49	(A)	830	32.49
North Central	2,111	-2	31.01	(A)	2,112	31.01
South Central	457	-5	20.64	(A)	458	20.64
West	346	-16	25.48	(A)	347	25.48
U.S. total	4,295 (B)	-6	28.39	5	4,300	28.39

To-date

2004 164,566 (B) 286 164,852

To-date

2003 177,582 (B) 534 178,116

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 63,000;
for the current year to date 1,976,000; for last year to date 2,393,000.**LIVE TURKEYS SLAUGHTERED** W/E 25-SEP-04

	<u>YOUNG</u>	<u>YOUNG</u>	<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		<u>TURKEYS</u>
	<u>-----THOUSANDS-----</u>				
Head	1,580	2,652	63	5	4,300
Avg Wt	15.74	36.02	24.37	28.17	28.39
Last week	1,759	2,730	87	6	4,582
Same wk yr ago	2,044	2,877	48	12	4,981
Avg Wt	15.75	34.80	22.85	31.14	26.85
To-date/2004	65,689	96,901	1,976	286	164,852
To-date/2003	71,408	103,781	2,393	534	178,116

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 30 SEPTEMBER 2004.

The market on ton breast meat and strapped tenderloins was mostly steady, balance of white meat steady to firm. Demand light to fair on ton breast meat and strapped tenderloins, fair to good on the balance of white meat. Offerings ranged from light at best on breast trim, scapula and wing meat with skin to light to adequate on ton breast meat and strapped tenderloins. The thigh meat market was steady; current shipments for the light to fair demand. Offerings mixed. Trading centered on a moderate volume of fresh ton breast meat for current shipments, balance slow. For domestic ton defatted gizzards 60, fresh Grade A 10-14 lb. WOGs 80-81 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	98.00		98.00	160
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	159.00	6
BREASTS, 4-8 LBS PLANT GRADE 2/		T	88.00	20
DRUMSTICKS, TOM	43.00-46.00		44.86	29
DRUMSTICKS, TOM—FRESH		W	46.00	80
DRUMSTICKS, HEN		W	42.00	20
WINGS, FULL-CUT, TOM	57.00		57.00	14
WINGS, FULL-CUT, HEN				
WINGS, V-TYPE, TOM	47.00		47.00	30
WINGS, V-TYPE, HEN		T	92.00	6
NECKS, TOM	32.00		32.00	14
NECKS, HEN	23.00		23.00	40
BREASTS, B/S, TOM 3/		T	165.00	80
BREASTS, B/S, TOM—FRESH 3/	207.00-209.00		208.45	440
THIGH MEAT		R	85.00	4
THIGH MEAT—FRESH		F	90.00	20
BREAST TRIM MEAT		W	129.00	120
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS		T	164.00	40
DESTRAPPED TENDERS—FRESH		F	180.20	200
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		W	19.00	40
MECHANICALLY SEPARATED—FRESH 4/				
EXPORT TRADING				
DRUMSTICKS, TOMS		W	44.33	120
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS				
MECHANICALLY SEPARATED 4/		W	20.00	300
THIGH MEAT - FROZEN	82.50-83.50		83.13	160

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 01 OCTOBER 2004.

The market on tom breast meat was steady to fully steady mostly steady with some industry members commenting on the unusual strength being demonstrated for the time of year. Demand slow to moderate with offerings generally held with confidence. The destrapped tenderloin market steady for the light to fair inquiry. Offerings of frozen spotty, fresh light to adequate. The market on breast trim, wing meat with skin and scapula was strong. Demand active. Offerings spotty. Some processors are attempting to adjust formulas of further processed product to availability of commodity items. The market on tom drums was barely steady to fully steady, mostly steady; balance of tom bulk parts steady to firm. Offerings of tom drums uneven, balance of tom bulk parts light at best and held with confidence. Offerings of frozen mechanically separated turkey were becoming less available with asking prices trending higher. Trading heavy on frozen thigh meat for export, fair on fresh tom breast meat for domestic shipments, balance light.

WEEKLY

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		R	98.00	160	98.00	160
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	159.00	6	159.00	6
BREASTS, 4-8 LBS PLANT GRADE 2/		T	88.00	20	88.00	20
DRUMSTICKS, TOM		R	44.86	29	43.56	149
DRUMSTICKS, TOM—FRESH		W	46.00	80	46.00	80
DRUMSTICKS, HEN		W	42.00	20	42.00	20
WINGS, FULL-CUT, TOM	57.00		57.00	40	55.23	434
WINGS, FULL-CUT, HEN	52.00		52.00	12	52.00	12
WINGS, V-TYPE, TOM		R	47.00	30	50.27	110
WINGS, V-TYPE, HEN	93.00		93.00	9	92.60	15
NECKS, TOM		R	32.00	14	29.14	154
NECKS, HEN	23.00		23.00	9	23.00	49
BREASTS, B/S, TOM 3/	168.00		168.00	40	166.00	120
BREASTS, B/S, TOM—FRESH 3/	207.00-210.00		207.90	400	208.26	860
THIGH MEAT						
THIGH MEAT—FRESH		F	90.00	20		
BREAST TRIM MEAT	130.00		130.00	40	129.25	160
SCAPULA MEAT						
TENDERLOINS	158.00		158.00	40	158.00	40
DESTRAPPED TENDERS	165.00		165.00	40	164.50	80
DESTRAPPED TENDERS—FRESH	186.00-188.00		186.75	160	186.75	160
WING MEAT WITH SKIN						
MECHANICALLY SEPARATED 4/		W	19.00	40	18.50	120
MECHANICALLY SEPARATED—FRESH 4/						
EXPORT TRADING						
DRUMSTICKS, TOMS	41.00-45.00		43.70	200	43.94	320
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS	25.00-27.00		25.50	208	25.50	208
MECHANICALLY SEPARATED 4/	18.00-20.00		19.50	160	19.83	460
THIGH MEAT - FROZEN	80.00-90.00		84.50	836	83.49	1,244

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.